



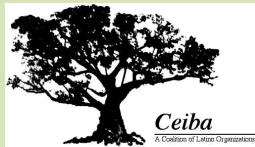
# THANKS FOR YOUR INTEREST IN VOLUNTEERING!

Ceiba's tax preparation efforts are run in cooperation with the Campaign for Working Families.

For more information about Ceiba, visit [www.ceibaphiladelphia.org](http://www.ceibaphiladelphia.org)

For more information about the Campaign for Working Families, visit [www.cwfp Philly.org](http://www.cwfp Philly.org)

**QUESTIONS?** Contact Lindsey Benitz Phone: (215) 634-7245 Email: [Lbenitz@ceibaphiladelphia.org](mailto:Lbenitz@ceibaphiladelphia.org)



## INSTRUCTIONS FOR REGISTERING AS A VOLUNTEER

Please visit the Campaign for Working Families website to register as a volunteer.

[www.cwfp Philly.volunteerhub.com](http://www.cwfp Philly.volunteerhub.com)

On this website you will sign up for four things:

### 1) Your tax site **ROLE**.

- If you want to prepare taxes, choose *Tax Preparer*.
- If you want to greet clients or provide general support to the tax site, choose *Greeter/Administrative Support*.
- If you want to help connect clients to other benefits (like Food Stamps and help with the FAFSA), choose *Resource Builder*.

### 2) Your **TRAINING** option.

Select *Basic Training Online* to indicate that you will study the materials and take the test online, or choose an in-person training option. There are accelerated in-person trainings for law students. If you choose the online option, you will also receive an email with detailed instructions from the Campaign for Working Families about completing your training.

### 3) Your tax **SHIFTS**.

Please choose a *minimum* of 6 shifts. To prepare taxes with Ceiba, please select shifts listed under the Ceiba Mobile Site. If you are specifically interested in working on ITIN applications, please select a Monday shift. Our tax site is busiest in February, so we encourage volunteers to get certified and join us as early in the season as possible.

### 4) Your **ORIENTATION** Session.

Select a site orientation date from the options under Ceiba Mobile Sites (North).

This is an important meeting where you will meet site staff and fellow volunteers, learn more about the logistics of the tax site, and have a chance to ask questions. We look forward to seeing you!

# INSTRUCTIONS FOR IRS VITA TAX PREPARER CERTIFICATION

- 1) **Download these two pdf documents. If you attend an in-person training, you will get hard copies of these.**

Publication 4012: VITA Volunteer Resource Guide

<http://www.irs.gov/pub/irs-pdf/p4012.pdf>

This is your resource and reference guide. You will need this to complete the test and you will refer to this book when preparing taxes at the tax site.

Publication 6744: Volunteer Assistor's Test/Retest

<http://www.irs.gov/pub/irs-pdf/f6744.pdf>

This is the test booklet for the 2011 tax season. All volunteers are required to pass the Basic certification test. You are encouraged to get certified at the Intermediate level. You will take the test online, but this test booklet gives you the questions in advance. The online version gives the answer choices in a different order, so you cannot copy your answers directly from the test booklet. However, entering your answers in the online test will be much easier if you complete the paper version first.

- 2) **Visit the IRS's Link and Learn website to study the Basic Certification Path course materials. (And/or attend a Campaign for Working Families in-person tax law training.)**

<http://www.irs.gov/app/vita/>

Click on the Certification Paths tab. Select 'Basic' and 'Student' from the drop down menus. This online course is similar to a PowerPoint presentation. You will need several hours to read/study all the sections (1 through 34).

- 3) **Register for the Practice Lab (A website that lets you practice using TaxWise software)**

<http://www.voltaxprep.com/>

The password for all users is: Learntwo

You will also need an individual login. Click Create New User. Enter your zipcode and email address.

WRITE DOWN YOUR USER ID and the zipcode you used to register. If you lose this information, you will not be able to access any returns you prepare in the practice lab.

USER ID: \_\_\_\_\_ Zipcode: \_\_\_\_\_

- 4) **Use the practice lab to prepare the returns for Scenarios 6 and 7 on the Basic certification test.**

*Note: When using the Practice Lab, complete the client's social security numbers and employer ID numbers by replacing the Xs with your User ID. Hit SAVE RETURN at the top of the screen before going to a new form.*

- 5) **Take the Certification Tests (Standards of Conduct and Basic Test Required. Intermediate level Encouraged.)**

Return to the Link and Learn Basic Course and click the Test link at the bottom of the page or

use this direct link to test login page: [linklearn.webtechteam.com](http://linklearn.webtechteam.com) (no www)

WRITE DOWN YOUR USER ID AND PASSWORD. You will need it if you decide to take the Intermediate test and to access and print your volunteer certificates.

USER ID: \_\_\_\_\_ Password: \_\_\_\_\_

- 6) **If you pass... Congratulations! Print your volunteer agreement and your certificate. Send your SIGNED volunteer agreement and certificate to the Campaign Volunteer Coordinator at [taxvolunteer@uac.org](mailto:taxvolunteer@uac.org)**

- 7) **If you don't pass on the first try, you have another chance to take the test. Review the materials and try again when you are ready.**

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